GLYNAC

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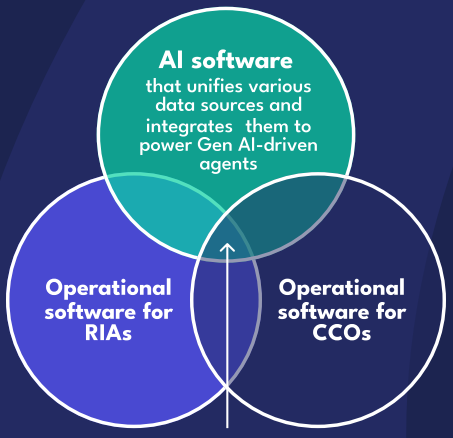
An AI control layer that unifies fragmented wealth management and compliance systems into a single source of truth.

Glynac AI


AI software
that unifies various data sources and integrates them to power Gen AI-driven agents
Operational software for RIAs
Operational software for CCOs

GLYNAC AI

Gen AI-driven software with deterministic compliance algorithms for wealth manager and compliance officer workflows.

For Compliance Officers

With easy access to all relevant data, compliance officers can work without friction, viewing complete wealth manager activity without requesting or searching for information.

For Wealth Managers

Gen AI enables wealth managers to turn fragmented data into usable knowledge, answering complex questions and surfacing insights instantly across their entire workflow.

Glynac AI Agents

COMPLIANCE AGENTS

Powered by Gen AI & Deterministic Algorithms

Ava

Compliance Intelligence

Tracks regulatory change & flags emerging compliance risks before they become issues.

Ethan

Risk Oversight Agent

Identifies account & transaction level risks & escalates irregularities for review.

Clara

Documentation Agent

Maintains audit-ready compliance records, policies, & documentation automatically.

Brandon

Surveillance Agent

Monitors communications and trading activity to detect conflicts and anomalies.

WEALTH MANAGEMENT AGENTS

Powered by Gen AI

Ana

CRM Agent

Keeps client records accurate, synchronized, and up to date across platforms.

Anthony

Billing and Reporting Agent

Automates fee calculation, invoicing, and financial reporting.

Robert

Knowledge Agent

Unifies data across systems to surface actionable insights for decision making.

Grace

Onboarding Agent

Automates client onboarding by collecting, validating, and organizing required data.

Glynac's Partners

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